

Facilitated Brand Strategy Workshop Description and Agreement

Objectives

A solid and focused brand strategy will help your business:

- Arrive at the “one thing”—your brand essence—the core of your promise to your target market
- Differentiate itself from other competitive offerings
- Discover an ideal, customer-friendly structure—the space in which your brand exists
- Move to the next level of effectiveness in the marketplace
- Increase the awareness and the perceived value of your brand
- Bring clarity and effectiveness in your marketing and communications efforts
- Motivate and inspire your brand team, employees, and other stakeholders

Workshop Description

The facilitated BrandXcellence Brand Strategy Workshop is a full day experience (9:00 sharp starting time and 4:00 ending time with an hour for lunch). Each workshop module incorporates either a group exercise or breakout session designed to answer a pragmatic series of questions leading to clear and actionable conclusions. A post-workshop deliverable will include a brand strategy document summarizing

the day’s results and providing a roadmap to guide future internal and external marketing and communications efforts.

Module 1: Workshop Introduction
 Module 2: The BrandX Definition
 Corporate Presentation 1*
 Corporate Presentation 2*
 Module 3: The BrandX Assessment
 Module 4: The Desired BrandX Model
 Module 5: The BrandX Realm
 Module 6: The BrandX Persona
 Module 7: The BrandXperience: Living the Brand

** In order to facilitate the assessment of the current brand and the development of a marketing SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis—a critical part of the branding process—two corporate presentations will be necessary. These are the responsibility of the client-company.*

Here is a sample outline:

Corporate Presentation 1: State of the Industry

Why does the market exist?
 Competitive landscape
 Is the segment in growth, stasis, or decline?
 Fact and stats — anything you think is relevant to painting a picture of the segment.

Corporate Presentation 2: Current Organizational Make-up and Environment

Mission and Vision (if they exist). If not, what are the core values of the business?

Product/Service mix

Who are our customers?

Current sales channels

Open book, if appropriate, sharing profitability as it relates to various organizational activities

Unless previous arrangements have been made, Michael DiFrisco, will facilitate the Brand Strategy Workshop, and it will be conducted on a date amenable to both the client-organization and Michael DiFrisco.

Facilitated Workshop Investment: \$2,495, plus actual travel expenses

Client-organization financial responsibilities will also include:

- Rental of video projector and screen
- Costs of the meeting room (offsite strongly recommended)
- Costs of lunch and any coffee, refreshment, or snack services provided by the hosting venue

A 50% initial payment will be invoiced upon signed agreement. The final 50% payment will be invoiced upon completion of the BrandXcellence Facilitated Workshop, **but only if you are delighted with the workshop experience.** Actual travel expenses will also be invoiced upon completion of the workshop. All invoices are payable within fifteen (15) days after date of the invoice. Post-workshop deliverables will be sent after receipt of final payment.

Authorization and Payment

The undersigned is authorized to sign on behalf of the Client-organization, making Client-organization responsible for the payment and conditions of this agreement.

Agreed and accepted for the Client-organization:

Signed _____

Title _____

Date _____

Note: Michael DiFrisco, d.b.a. BrandXcellence agrees to hold any discussions, details, and sensitive information about the Client-organization, its strategies, markets, or future plans in the highest confidence. BrandXcellence will exercise its best judgment in the practice of facilitating and consulting regarding the Client-organization's brand strategy with a view to avoid all claims or suits being made against the Client or BrandXcellence. It is mutually agreed, that Client-organization will defend, indemnify, and hold BrandXcellence, its officers and employees, harmless against any loss sustained as a result of any claim or suit based upon assertions made for any of the Client-organization's products or services or any of the products or services of any of the Client-organization's competitors in any advertising or marketing communications which may arise from the conclusions drawn in the workshop and/or as the result any consulting or recommendations.

Return this signed agreement to:

BrandXcellence
Attn: Michael DiFrisco
7001 Reston Heights Dr.
Madison, WI 53718